DD577 Appointment in PCOLS

Highlights (Page 1)

Applications Impacted

- ☐ EMMA
- ☐ AIM
- ■ Reportin
- ■ RAD
- ■ DM

Release: AIM Release v4.0
Release Date: 05/2015

The Certifying Officer Appointment Process can be performed in PCOLS eliminating the need for printing and filing of separate DD Form 577, in most cases

PCOLS will capture the appointment information for each Certifying Officer. DFAS will have the ability to use appointments.

Legislation (COL) for Purchase Card Training (CLG 006) is available on the DAU website. PCOLS has already been enhanced to automatically record individuals' CLG 006 training completion data.

What Roles are impacted?

Appointing Authority (AA) – This new role will create the appointment records for the certifying officers in AIM. The AA role is provisioned by the A/OPC in EMMA and has access to the PCOLS AIM application only. There is a limit of 30 AA users per PCOLS organization. The Appointing Authority (AA) has no responsibility or access involving the Managing or Cardholder Account processes.
CO Verifier (DFAS role) – This new role will allow authorized DFAS personnel to search for, view and print appointment records. This role will be provisioned by a DFAS Representative and is not visible to the procurement roles.

What is still required?

Component procedures must be followed to determine who may serve as the AA. Initial and annual COL training must be completed.

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LINKS: *AIM 4.0 Release Notes* *PCOLS Application* *DPAP Purchase Card* *DAU PCOLS*

DD577 Appointment in PCOLS

Highlights (Page 2)

How do I add the Appointing Authority (AA) role?

1. As an A/OPC log on to EMMA under the desired A/OPC organization
2. Click on their role
3. Select the “Add Role” action and click “Go”
4. Select the Appointing Authority role and click “Submit”
5. AA role has been successfully added to the A/OPC Organization
6. The steps for adding the AA role to an A/BO Supervisor sub-org are the same except, the A/OPC will select the sub-org name where the AA role is being added vs. selecting the A/OPC role as was done in step 2 above.

*NOTE: **Provisioning** a user in the AA role is the same as provisioning any other user in a role via the DOD EDI, Person ID, method.*

The Appointing Authority role must be added in EMMA by the A/OPC. The A/OPC logs on to EMMA under their desired A/OPC organization.

The AA role can be added to all organizations in a hierarchy or any combination of organizations as needed. Each AA role that is added can hold up to 30 AAs

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DD577 Appointment in PCOLS

Highlights (Page 3)

Appointments can be filtered by status or a "Search Appointments" feature is also available to display the Appointment Records (i.e., Active, Pending, and Terminated).

As an AA, How do I create an appointment?

Only AAs can perform the first step in the Create Appointment workflow

1. In AIM, select your Appointing Authority role
2. Select the "Appointments" tab *(From this screen, the Appointing Authority can create "New"* ***or*** *"Terminate" existing Certifying Officer Appointments)*
3. Select "Create New Appointment"
4. Select the A/BO you want to appoint as a Certifying Officer. The default display lists ten A/BOs. If you have more than ten A/BOs change the "# To Display".

NOTE: *AAs provisioned in any sub organization will see all A/BOs in the A/OPC organization. Unless there are more than 30 AAs. there is no benefit to provisioning AAs under the A/OPC role.*

Appointments are only viewable by A/OPCs, A/BOs, and Appointing Authority (AAs).

5. Complete the "Create Appointment Record" screen
6. Submit the information; a task will be sent to the A/BO for completion of the appointment

NOTE: *DAU CLG 006 training date is automatically fed to PCOLS for users who registered for the course using their CAC. For other users, "Training Date" and "Training Description" maybe manually entered into PCOLS by the A/OPC.*

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